

School of Mortgage Banking Course I

Introduction to the Real Estate Finance Industry

AGENDA

Day #1

7:30 a.m.	Continental breakfast and Registration
8:00 a.m.	Introduction, Logistics & Overview of Training, Materials
8:15 a.m.	Introduction to Mortgage Banking
9:30 a.m.	Break
9:45 a.m.	Introduction to Mortgage Banking, continued
10:45 a.m.	Ethics
11:30 a.m.	Current Issues in Mortgage Banking - <i>discussion</i>
Noon	Lunch
1:00 p.m.	Regulatory Compliance
3:00 p.m.	Break
3:15 p.m.	Laws Affecting the Mortgagee's Interest in Property
5:00 p.m.	Break
5:15 p.m.	Nontraditional Mortgage Products
7:15 p.m.	End of Session

Day #2

Note: The timing of the content and case studies for the Day #2 afternoon/evening sessions may vary. However, we will finish no later than 7:30 pm.

7:30 a.m.	Continental breakfast
8:00 a.m.	Loan Products
9:45 a.m.	Break
10:00 a.m.	Loan Production: Overview and Origination
Noon	Lunch
1:00 p.m.	Loan Production: Processing
2:00 p.m.	Loan Production: Processing Case Study
2:30 p.m.	Break
2:45 p.m.	Loan Production: Underwriting
4:00 p.m.	Loan Production: Closing, Shipping, and Delivery
5:00 p.m.	Exam Review; Review of Underwriting Case Study Materials
5:30 p.m.	Break: Dinner and work on your own – Team - Underwriting Case Study
7:00 p.m.	Reconvene – Underwriting Case Study discussion
7:30 p.m.	Case Study discussion concludes

Day #3

7:30 a.m.	Continental breakfast
8:00 a.m.	Loan Administration
9:45 a.m.	Break
10:00 a.m.	Loan Administration – continued
Noon	Lunch
1:00 p.m.	Quality Control Case Study
2:15 p.m.	Break
2:30 p.m.	Fraud and Quality Assurance
4:30 p.m.	Review
5:00 p.m.	End of Session

Day #4

7:30 a.m.	Continental breakfast
8:00 a.m.	Secondary Marketing
9:45 a.m.	Break
10:00 a.m.	Secondary Marketing – continued
Noon	Lunch
1:00 p.m.	Warehousing/Warehouse Lending
2:00 p.m.	Break
2:15 p.m.	Commercial Lending
4:00 p.m.	Review/Exam Preparation
5:00 p.m.	School of Mortgage Banking concludes

Participants have two weeks at the conclusion of Course I to complete an online assessment. A score of 75% or above is a passing score.